

Case Study

 Simpson Grierson

Simpson Grierson is New Zealand's largest commercial law firm, with specialists in all areas of business law, and a reputation as New Zealand's "most innovative and modern" law firm. The firm has three offices: Auckland, the country's commercial centre, Wellington, New Zealand's political capital and Christchurch, in the South Island. In total, Simpson Grierson employs 420 staff, including more than 200 lawyers. Internationally, the firm is associated with Lex Mundi, the world's leading association of independent law firms.

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Shane Robb IT Service Manager
Simpson Grierson

Market intelligence

Having spent several years using an incumbent client relationship management system (CRM), Simpson Grierson was well aware of the benefits of holding a centralised record of the firm's main contacts. However, with its existing system reaching the end of its natural life, and an abundance of CRM systems to choose from, the question was - which to pick? The International Legal Technology Association (ILTA) regularly conducts surveys about which CRM solutions law firms are using. "When we heard that 75 per cent of ILTA member firms used InterAction, we realised we should definitely consider it," said Shane Robb Simpson Grierson's IT Service Manager. "In the end, we decided to chose InterAction for two main reasons – it's ease of use, and because it was specifically designed for law firms."

A successful deployment

Although Simpson Grierson initially implemented InterAction in late 2005 it was only really after the firm's management posted a mandate for compulsory firm-wide use in 2007 that acceptance and usage soared. Previously only the firm's IT and Marketing department, plus a small group of 'Super Users', had fully embraced the product, and were using it as a matter of course. But all of this changed in 2007, and a specialist support contractor was bought on board to take the InterAction deployment to another level. All partners, associates and - crucially - legal administrators would be expected to use InterAction every day, as a matter of course.

To achieve this objective, the firm's Marketing and IT departments focused on two elements. Firstly, they won a partnership-level endorsement, which made the comprehensive deployment of InterAction the firm's number one internal priority. Secondly, they engaged a new IT consultancy and solutions provider, Trinogy Systems. Not only did Trinogy roll out a comprehensive training scheme to all relevant personnel, and also

resolved a series of outstanding issues. "Because I hadn't been thoroughly trained in how to use InterAction, I was spending 2-3 days per week addressing technical issues and devising workarounds," Shane continues. "After we'd engaged Trinogy, it took them just two days to resolve all of these issues. Their training was so successful that I was even able to run the upgrade to the latest version of InterAction myself - which resulted in substantial cost savings to the firm. There were no complications during the upgrade, and everything worked perfectly."

Managing data

In the history of their CRM deployment, Simpson Grierson has gone through three distinct phases of how the firm managed its contacts data. Prior to InterAction, the firm had just 3,000 centrally-stored contacts stored in its former CRM system - even though many of the firm's personnel had in excess of 1,000 contacts in their individual Outlook contact books. However, during the initial rollout with the firm's previous support provider, the total number of contacts stored centrally within InterAction ballooned to almost 86,000 contacts. With assistance from Trinogy, Client Data Analyst Harry Bulos was able to clean and categorise the data down to a far more manageable 42,000 records. Of these, 35,000 are now shared throughout the firm. A similar number are stored centrally within InterAction, but are mainly for private use.

In total, the data cleansing exercise took around ten months to complete. And, despite the sophistication of the system itself, the firm used a surprisingly low-tech method to achieve its objective. Users' contacts lists were extracted from their personal Outlook address books, loaded into Excel spreadsheets, printed out, and then physically circulated in paper form for checking - with the expectation that all corrections must be returned within two weeks. However unconventional

this approach, the results speak for themselves. "Of all the thousands of invitations to events and client communications we have sent out since we cleaned up our data, we have had just one invitation returned because of incorrect contact details," says Kathryn Lee, Simpson Grierson's Marketing Director. "That's as close to 100 per cent accurate as it's possible to get. Going forward, the firm receives around 70 change requests per day, which tells us that users are updating the system on a regular basis. A recent audit of InterAction by the support service firm Trinogy gave Simpson Grierson a completely clean bill of health for the quality of the content database.

Despite the unconventional method used during the initial data clean up, most users now update their contacts using InterAction's Outlook interface - one of the main selling points of InterAction. However, a small number of more confident users make use of the more sophisticated web client interface to manage their data. "I think the number of users who prefer the web client interface will increase, as lawyers become more tech-savvy," Ms Lee adds.

To ensure the data quality remains high, the firm now actively monitors quality of new data being loaded. If specific mistakes or omissions are becoming more commonplace, additional training is provided. In reality, users have become so enthusiastic about adding new contacts' details that they may now do so via their Blackberry's on their way back from meetings. "From a marketing perspective, that means a fee-earner can meet a new client in the morning, and that client can be sent relevant marketing literature that afternoon," says Ms Lee.

Future plans

Having recently deployed the most up-to-date version of InterAction, the firm has two additional CRM projects currently in the pipeline. The first is relatively simple. In future, the firm will make the reimbursement of expenses for ad hoc meeting with potential clients conditional on those contacts' details being added to InterAction. The rationale for this strategy is two-fold. Firstly, these low-level, informal meetings can often be the basis for future work. Secondly, if a lawyer incurs an expense that they expect the firm to pay for, the firm should know whom the lawyer is meeting.

Going forward, the firm hopes to develop InterAction as a tool for calculating client retention and market growth. This includes getting an understanding of the capabilities InterAction Opportunities, software which links the firm's billing and practice management software with InterAction. This innovation would provide key decision-makers with a comprehensive overview of both their clients' revenue-generating, and also their business development, interactions with the firm. "We currently overlay these two sets of data manually, to allow us to get a complete picture of our relationship with our clients," says Client Data Analyst, Gabrielle Lynam-Smith.